



Social Assistance Management System (SAMS)
Software Help Sheet 20:
III-E FCSP/ FCSP(G) Registered Service Delivery

Author:	Jaime Morales
Creation Date:	10/02/2009
Last Revised:	6/16/2010
Version:	2.1

III-E FCSP/ FCSP(G) Registered Service Delivery

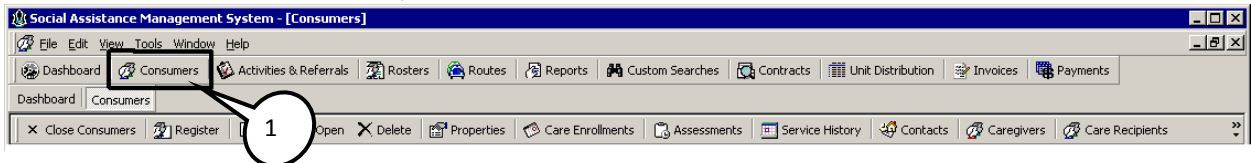
Background

The California Aging Reporting System (CARS) was instituted by the California Department of Aging, (CDA) on July 1, 2008. This new system was implemented to gather the detailed client and service data required for the National Aging Programs Information System (NAPIS).

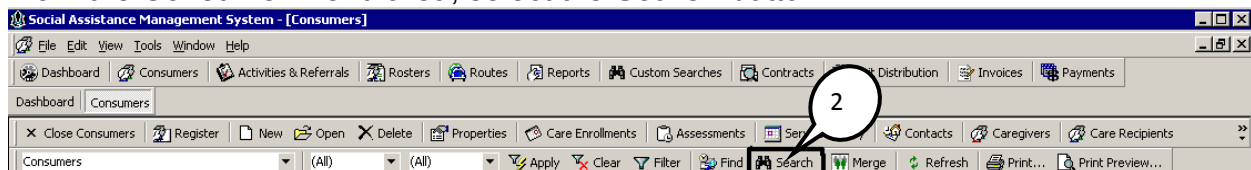
Part One: Enter Client Intake Information

Entering client demographic data prior to delivering services

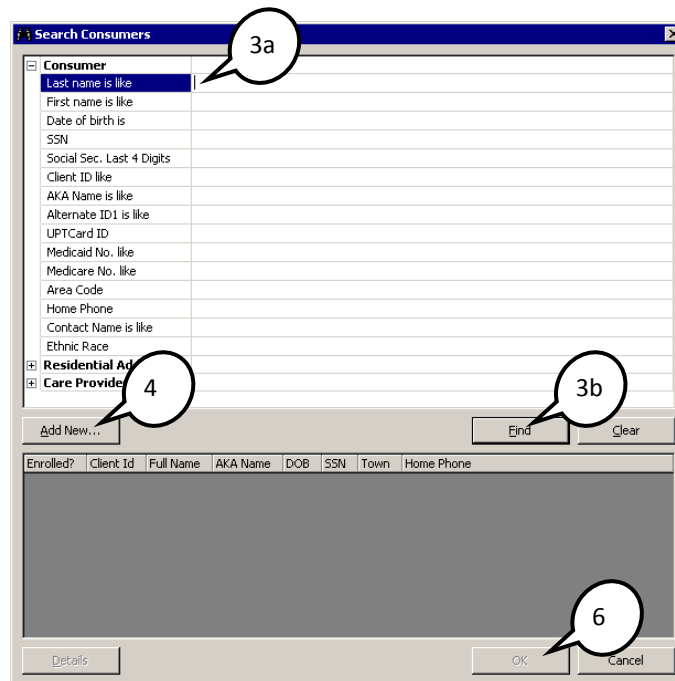
1. From the SAMS main menu, select the **Consumer** button.



2. From the Consumer menu area, select the **Search** button.



3. The Search Consumers window will appear. Use the search function to determine if the consumer is already in SAMS by (3a) entering appropriate search criteria, and then (3b) selecting the **Find** button.



4. If the consumer is not found, select **Add New ... (consumer)** button otherwise proceed to step 6.
5. Fill out the required Client Intake Information.

III-E FCSP/ FCSP(G) Registered Service Delivery

The screenshot shows a software interface with a sidebar on the left containing icons for Summary, Details, Assessments, Care Management, Service Orders, Service Delivery, and Activities & Refer... The main area is titled 'Untitled - Details' and contains a form with several sections: General, Personal, Residential Address, Mailing Address, NAPIS, Status, Insurance, Other, and Characteristics. The 'Personal' section is expanded, showing fields for Prefix, First Name, MI, Last Name, Suffix, Maiden Name, AKA Name, Date Registered (04/16/2009), Consumer Details Last Reviewed (04/16/2009), Marital Status, Gender, Birth Date, SSN, Info Release Authorized (No), Default Agency (Los Angeles County AAA), Area Code, and Home Phone. A callout bubble with the number 5 points to the 'Date Registered' field.

6. If the Consumer is found, select the consumer then select the **OK** button and move on to Part Two to do the Care Enrollment.

Part Two: Care Enrollment

Once the consumer is created or found, enroll the consumer into a care program.

7. Select **Care Enrollments** from the Consumer Details sub-menu.

The screenshot shows the same software interface as before, but with the 'Care Enrollments (1)' option selected in the sidebar. A callout bubble with the number 7 points to this option. The main form area remains the same, showing the 'Personal' section.

8. Click on the **Add Care Enrollment** button to have the **Add Care Enrollment** window appear. Complete this as you would for any care enrollment. **Please note SAMS cannot attach a care enrollment for a period prior to the contract start date.** Also the "Application Date", "Received Date", "Status Date" and "Start Date" have to be the same and must reflect the instance when the enrollment should have started for the consumer.

III-E FCSP/ FCSP(G) Registered Service Delivery

Details:	
Level of Care	Federal Administration...
Service Program	Family Caregiver Supp...
Care Program Name	Family Caregiver Supp...
Application Date	07/01/2009
Received Date	07/01/2009
Termination Date	
Status	Active
Reason	
Status Date	07/01/2009
Start Date	07/01/2009
End Date	

Buttons: OK, Cancel, Add Next

9. Click OK.

PART III: Registering a Care Recipient

Linking a Care Recipient to a Caregiver is needed prior to delivering services. Once Caregivers and Recipients are linked, then a specific Service Delivery can be directly associated with a recipient.

Social Assistance Management System - [AAAAging, TestesCareGiver I - Consumer]

File Edit View Tools Window Help

Dashboard Consumers Activities & Referrals Rosters Routes Reports Custom Searches Contracts Unit Distribution Invoices

New Call Call Log Search for Services

Consumers AAAAging, TestesCareGiver I - Consumer

Close Consumer Save Save and Close Print Consumer Print Preview Consumer Add Care Recipient Edit Care Recipient Delete Care Recipient

AAAAging, TestesCareGiver I | 1331560915 | Unknown | Unknown

Contents

- Summary
- Details
- Assessments
- Care Management
- Service Orders
- Service Delivery
- Activities & Refer...

AAAAging, TestesCareGiver I - Care Recipients

Is Primary Careg...	Recipient Name	Recipient Client ID	Recipient Agency	Start Date	End Date	Relationship To Recipient	FCSP Type
---------------------	----------------	---------------------	------------------	------------	----------	---------------------------	-----------

General

- Contacts
- Locations (1)
- Phones
- User Fields (3)
- Ethnic Races
- Care Enrollments (5)
- Co-Pay
- Co-Pay Relations
- Care Managers
- Fund Identifiers (3)
- Providers (2)
- Caregivers
- Service Suspensions

Care Recipients

0 Items

CSSIT003 SAMS2K_CA_LACOUNTY 6/7/2010 12:36 PM

Add Care Recipient

Details	
Care Recipient	
Recipient Client ID	
Recipient Agency	
Relationship To Care Recipient	
Family Caregiver Program Type	Federal
Is At Risk For Abuse Or Neglect	Don't Know
Is Primary	Yes
Start Date	04/01/2008
End Date	

Buttons: OK, Cancel, Add Next

III-E FCSP/ FCSP(G) Registered Service Delivery

10. Click on **Care Recipients** from the Consumer Details sub-menu.
11. From the Consumer Menu, select **Add Care Recipient**.
12. Click on the **Browse** button to have the Search Consumer window appear.

Search Consumers

Consumer

Last name is like AAAAging

First name is like Tester

Date of birth is

SSN

Social Sec. Last 4 Digits

Client ID like

AKA Name is like

Alternate ID1 is like

UPTCard ID

Medicaid No. like

Medicare No. like

Area Code

Home Phone

Contact Name is like

Ethnic Race

Residential Address

Care Providers

Add New...

Find Clear

Client Id Full Name AKA Name Agency DOB SSN Town Home Phone

Details OK Cancel

13. Fill in Care Recipient identifying information to search for an existing consumer or to ensure a consumer is not already in SAMS.
14. Click on the **Find** button.

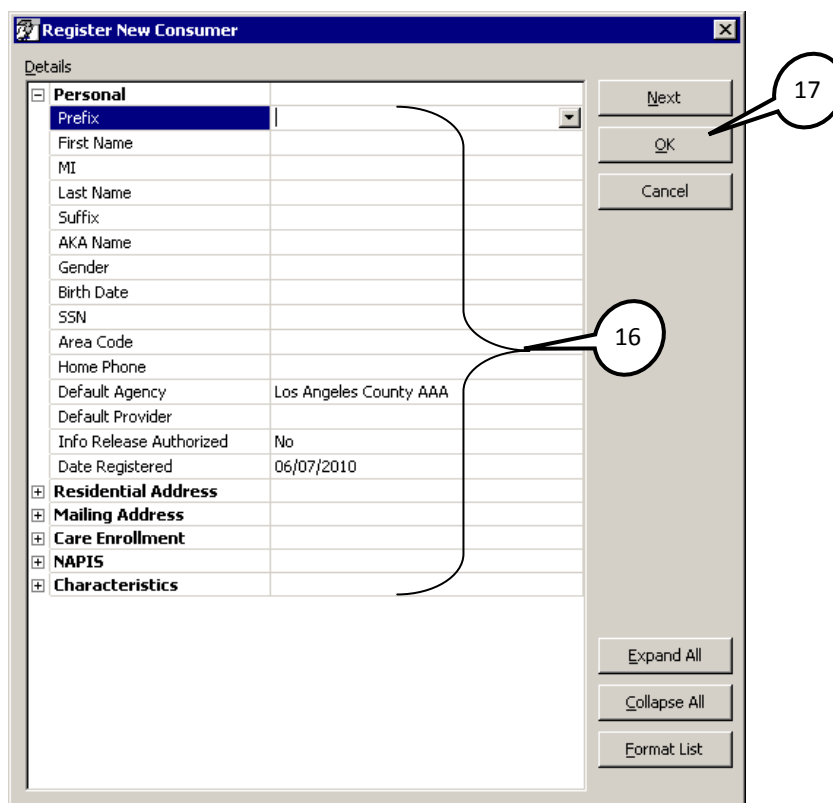
Social Assistance Management System

Zero records matched the specified search criteria.

OK

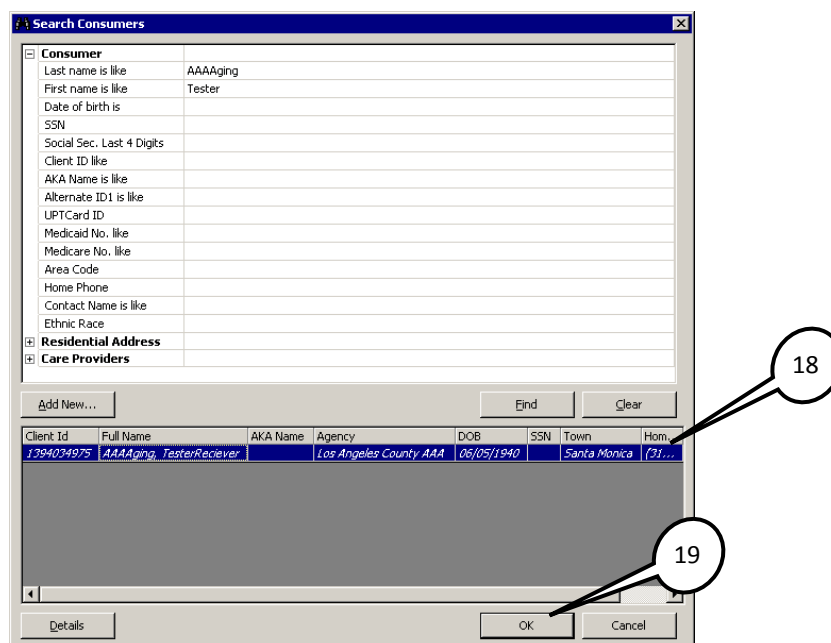
15. If the consumer cannot be located within SAMS, click **OK** on the pop up screen and proceed to step number 16. If consumer is located, then proceed to step 18.

III-E FCSP/ FCSP(G) Registered Service Delivery



The 'Register New Consumer' dialog box is shown. It has a 'Details' section with a tree view on the left containing 'Personal', 'Residential Address', 'Mailing Address', 'Care Enrollment', 'NAPIS', and 'Characteristics'. The 'Personal' section is expanded, showing fields for Prefix, First Name, MI, Last Name, Suffix, AKA Name, Gender, Birth Date, SSN, Area Code, Home Phone, Default Agency (Los Angeles County AAA), Default Provider, Info Release Authorized (No), and Date Registered (06/07/2010). On the right, there are 'Next', 'OK', and 'Cancel' buttons. Callout 16 points to the 'Default Agency' field, and callout 17 points to the 'OK' button.

16. Fill in all relevant consumer information including the proper Default Provider as well as the Date Registered.
17. Click on **OK** to add the consumer to SAMS. Do not click on Next as this will prompt you to add more consumers onto SAMS.



The 'Search Consumers' dialog box is shown. It has a 'Consumer' section with a tree view on the left containing 'Last name is like', 'First name is like', 'Date of birth is', 'SSN', 'Social Sec. Last 4 Digits', 'Client ID like', 'AKA Name is like', 'Alternate ID1 is like', 'LPTCard ID', 'Medicaid No. like', 'Medicare No. like', 'Area Code', 'Home Phone', 'Contact Name is like', 'Ethnic Race', 'Residential Address', and 'Care Providers'. The 'Last name is like' field is set to 'AAAAging' and the 'First name is like' field is set to 'Tester'. Below the tree view, there are 'Add New...', 'Find', and 'Clear' buttons. At the bottom, there is a table with columns: Client Id, Full Name, AKA Name, Agency, DOB, SSN, Town, and Home. The first row of the table is highlighted. Callout 18 points to the 'Find' button, and callout 19 points to the 'OK' button.

Client Id	Full Name	AKA Name	Agency	DOB	SSN	Town	Home
1394024975	AAAAging, TesterReiever		Los Angeles County AAA	06/05/1940		Santa Monica	(31...

III-E FCSP/ FCSP(G) Registered Service Delivery

18. Ensure the correct consumer is highlighted.
19. Click on the **OK** button.

Details	
Care Recipient	AAAAging, TesterReiever
Recipient Client ID	1394034975
Recipient Agency	Los Angeles County AAA
Relationship To Care Recipient	Grandparent
Family Caregiver Program Type	Federal
Is At Risk For Abuse Or Neglect	Don't Know
Is Primary	No
Start Date	04/01/2008
End Date	

Buttons: OK, Cancel, Add Next

20. When the Add Care Recipient window re-appears, click on the **Relationship To Care Recipient** field to select the appropriate relationship.
21. Ensure that the **Start Date** is correct.
22. Click on the **OK** button to create a link between the Caregiver and Care Recipient.

Sample Display

(23)

III-E FCSP/ FCSP(G) Registered Service Delivery

23. The Sample Display demonstrates a care recipient successfully linked to a caregiver.

PART IV: Delivering a service tied to Care Recipient

The example illustrates a III-E registered Supplemental Services linked to a Care Recipient. This process works for any registered service that requires a linked consumer.

The screenshot shows the SAMS interface with the following elements:

- Menu Bar:** File, Edit, View, Tools, Window, Help.
- Toolbar:** Dashboard, Consumers, Activities & Referrals, Rosters, Routes, Reports, Custom Searches, Contracts, Unit Distribution, Invoices, Payments.
- Navigation Bar:** New Call, Call Log, Search for Services.
- Consumer Selection:** A dropdown menu showing 'Consumer' (33).
- Service Delivery Table:**

Service	Provider	Care Program Name	Service Period	Topics	Type	Unit Price	Tot...
III-E FCSP Registry Services		Family Caregiver Support Program	September, 2009	0	Hour(s)	\$32.00	4.50
III-E FCSP Registry Services		Family Caregiver Support Program	December, 2009	0	Hour(s)	\$32.00	1.00
Grand Total				0			5.50
- Service Delivery Details:**
 - Care Program: Family Caregiver Support Program (09/17/2009) - Active (25)
 - Service Category: Supplemental Services (26)
 - Service: III-E FCSP Registry Services (27)
 - Subservice: III-E FCSP Registry Services (28)
 - Fund Identifier: III-E (28)
 - Service Month: 01/2010
 - Agency: Los Angeles County AAA
 - Provider: [Provider's Name] (29)
 - Subprovider: [Provider's Name] (29)
 - Caregiver: [Provider's Name] (29)
 - Care Recipient: [Recipient's Name] (30)
 - Site: [Recipient's Name] (30)
 - Place of Service: [Recipient's Name] (30)
 - Units: 1.00
 - Unit Price: \$123.45
 - Daily Unit Details: (1 Item)
 - Total Cost: \$123.45 (31)
 - Caregiver Service Delivery: [None]
 - Diagnosis Code: [None]
 - Service Order: (None)
 - Comments: [None]
- Daily Units Calendar:** A calendar for January 2010 showing units for each day. The unit for January 25th is highlighted with a '1' (32).

24. Select **Service Delivery** to add a service to the selected consumer.
25. Select Family Caregiver Support Program as the **Care Program**.
26. Select Supplemental Services as the **Service Category**.
27. Select the appropriate **Service**.
28. Enter III-E as the **Fund Identifier**.
29. Enter yourself as the **Provider**.

III-E FCSP/ FCSP(G) Registered Service Delivery

30. Select the **Care Recipient** from the dropdown list*.
31. Enter the dollar amount in the **Unit Price** (the example has \$123.45).
32. Click on **Daily Unit Details** to enter the number of units on the appropriate day.
33. Select **Save and Close** from the menu.

* Note that every service being provided to a Care Recipient by a Caregiver must have a Care Recipient specified on line number 16.